ORACLE POLICY AUTOMATION WITH SIEBEL CRM

Version 12 Integration Planning Guidelines

Oracle Policy Automation (OPA) delivers consistent and auditable advice across channels and business processes by capturing rules in natural language Microsoft Word and Excel documents and building interactive customer service experiences called interviews around those rules. OPA provides a way to define agile customer and agent-facing advice and calculations for Siebel without the need of extensive customizations.

Introduction

This document is a guide for Oracle customers planning to use Siebel with Oracle Policy Automation 12. It is particularly relevant for customers that are currently using OPA 10.4.x with Siebel, and wish to upgrade to OPA 12 to take advantage of the latest product enhancements.

Oracle provides a separate *OPA Connector for Siebel* product for versions of Oracle Policy Automation up to 10.4.x. With the release of Oracle Policy Automation 12 the integration between Siebel and OPA moved into Siebel. Siebel IP2014 released the first integration to OPA version 12. From Siebel IP2016 onwards, most existing OPA integrations can be migrated to OPA 12 using the OPA connectivity built into Siebel.

Advantages of Migrating to OPA 12

OPA 12 was released in early 2015. It is the first version of OPA available for both public cloud and private cloud (on-premises) environments.

There are many reasons for Siebel customers to consider upgrading to OPA 12:

- Simplified rule modeling and mapping of rules to the Siebel data model

- OPA OpenUI applet provides seamless OPA interviews in Siebel

- Easier policy deployment and management via the new OPA Hub

- Option of 100% compatible cloud environments, for dev/test or production

- New built in policy collaboration and sharing features

Like OPA 10, OPA 12 provides a desktop Policy Modeling experience that works together with Word and Excel to make it easy for business policy experts to define rules and interviews that automate decision making and data collection in areas such as benefit eligibility, financial regulation compliance, warranty payments, loan or insurance eligibility and assessments, and more.

Key Facts

PARALLEL OPA DEVELOPMENT

A single Siebel repository can be used simultaneously for OPA Connector for Siebel 10.4.x and the latest Siebel and OPA v12 Connectivity. A single WebLogic server can host both OPA 10.4.x and OPA 12.

OPA INTERVIEW APPLET

The latest Siebel Innovation Packs include an OPA interview applet that is automatically styled using Siebel OpenUI to deliver consistent look and feel with other Siebel views.

INTEGRATE WITH OPA CLOUD

Both OPA Cloud and OPA on-premises releases can be integrated with Siebel IP2016. Simply configure Siebel to use the appropriate OPA site URL.

SIEBEL UPGRADE READINESS

Use OPA to help eliminate complex eScript from Siebel repositories. The existing OPA 10.4 Connector continues to work with the latest Siebel Innovation Packs, and logic being managed in OPA can be migrated to OPA V12 when ready.

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OPA and Siebel Version Compatibility

To simplify migration from the OPA Connector for Siebel to the built-in connectivity available with Siebel IP2014 and later, side-by-side operation is supported. See the *Parallel OPA Development* sidebar.

The recommended approach for Siebel customers migrating from Oracle Policy Automation v10 to v12 is to upgrade to Siebel IP2016.

Siebel IP2014 and above requires a minimum version of OPA 12.2.0, also known as OPA August 2015. The following table summarizes compatibility between major Oracle Policy Automation and Siebel CRM versions.

Siebel version	OPA v12.x	OPA v10.4.x + Connector
Siebel IP2016	✔	✔
Siebel IP2014 -2015	Yes, but see notes below	✔
Siebel 7.8.x to Siebel 8.2.2	✘	✔

Notes
1. Siebel IP2014 has support only for simple interviews without pre-seed, save / resume & submit. This is OK for new OPA customers, but if migrating existing 10.4 integrations customers should upgrade to Siebel IP2016.
2. Siebel IP2015 Patch Set 5 introduced support for outbound web service calls to the OPA Determinations API Answer Service. This is equivalent to the OPA 10.4 Determinations Server Assess Service integration.

Although the full integration with OPA v12 requires Siebel IP2016, it is feasible to connect OPA v12 interviews and OPA v12 APIs with earlier Siebel versions. **Contact Oracle Consulting for help with these scenarios.**

Conclusion

Siebel and Oracle Policy Automation are a powerful combination that reduce the maintenance cost of delivering dynamic advice and personalized up to date decision-making in CRM process flows. OPA 10.4 and 12 can be used side-by-side with the latest Siebel Innovation Packs. Oracle continues to enhance and streamline the use of Siebel with Oracle Policy Automation, allowing Siebel CRM customers to take advantage of the latest Oracle Policy Automation features.

Future Developments

In an upcoming Siebel Innovation Pack, Oracle plans to support OPA interview features such as file upload, signature capture, and form generation.

Support is also planned for standalone OPA web interviews to pre-seed and submit data to Siebel, using mappings defined in Oracle Policy Modeling.

Documentation Links

Siebel Bookshelf
http://bit.ly/2a86WpJ

Oracle Policy Automation
http://bit.ly/2avm9ot

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